AFRAA AIR TRANSPORT REPORT

QUARTER 4

2025

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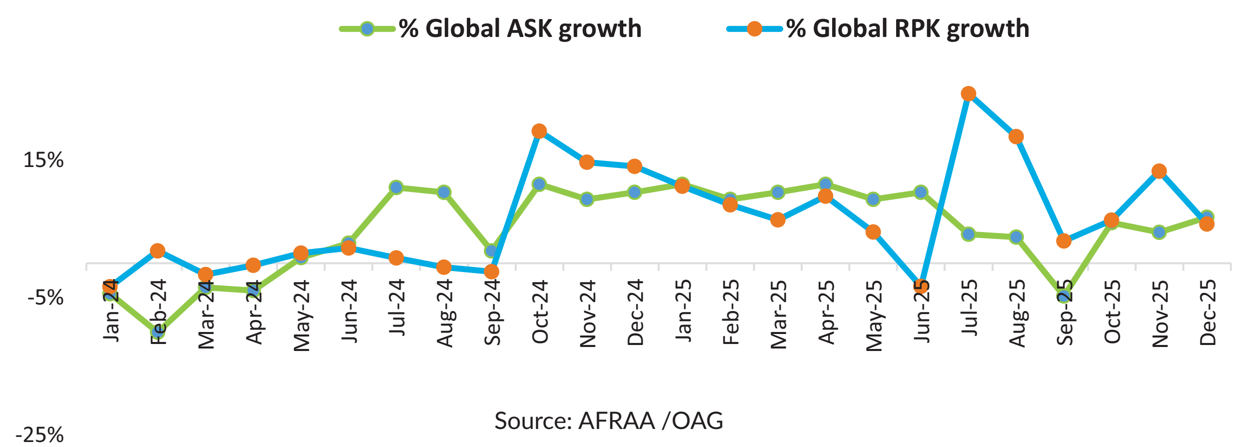
Global Airline industry performance

In Q4 2025, the global airline industry maintained overall resilience, though performance remained uneven across regions. Passenger demand continued to expand, with international travel again acting as the primary growth engine. Asia-Pacific carriers sustained strong momentum, while parts of Latin America continued to outperform many mature markets. In contrast, growth in North America and Europe moderated as capacity expansion outpaced demand in certain corridors. Load factors remained relatively high by historical standards, but edged slightly lower compared with earlier quarters as airlines continued to restore and expand capacity. Globally, RPKs (Revenue Passenger Kilometers) increased by 5.1% year-on-year in Q4 2025, while ASKs (Available Seat Kilometers) rose by 8.7% compared to Q4 2024, reflecting a continued supply-demand imbalance in some markets.

Financial performance remained broadly positive. Several major carriers reported solid quarterly results, supported by premium cabin demand, ancillary revenue growth, and disciplined cost management. However, profitability varied significantly by region and business model, with full-service network carriers generally outperforming low-cost operators facing yield pressure in competitive short-haul markets.

Structural challenges persisted. Aircraft delivery delays and ongoing supply-chain bottlenecks constrained fleet planning and operational efficiency. At the same time, elevated fuel costs and limited availability of sustainable aviation fuel (SAF) continued to pressure margins and complicate decarbonization strategies. Labor cost inflation and infrastructure constraints at major hubs also weighed on operational reliability in certain regions. Overall, Q4 2025 reflected an industry that remains profitable and operationally resilient, but one still characterized by tight margins, capacity adjustments, and continued exposure to input cost volatility.

Figure 1: Global Industry ASK and RPK growth,



Source: AFRAA /OAG

African airlines performance

Passenger Revenue

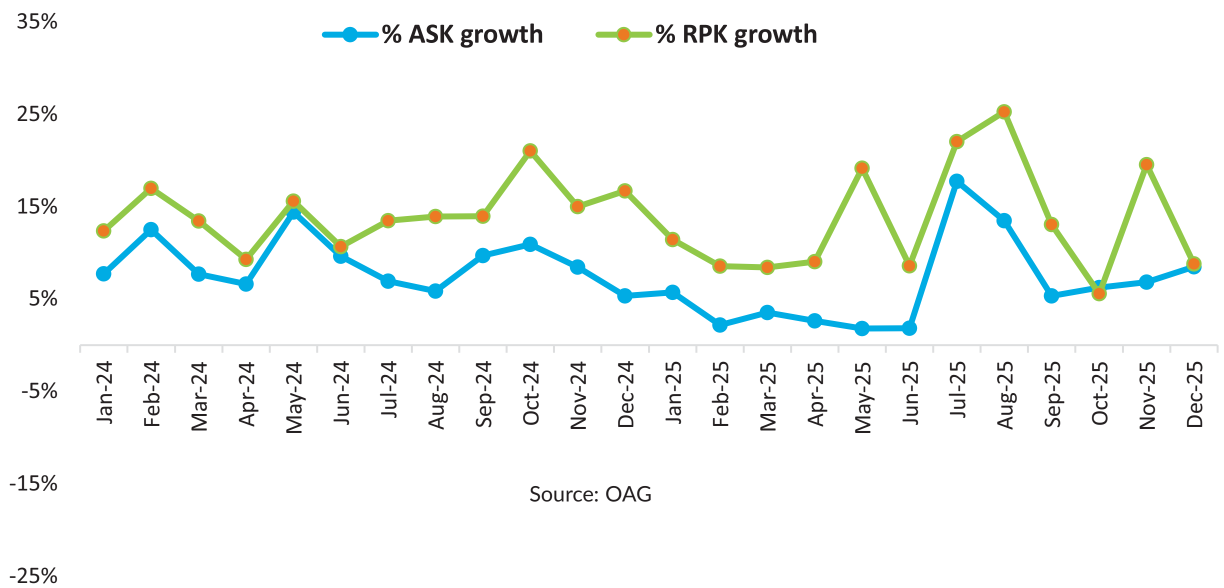
Passenger revenue in Q4 2025 increased by 7.9% compared to Q4 2024.Figure 2 provides a graphical comparison of passenger revenue between Year 2025 verses Year 2024.

Figure 2: Quarterly Passenger Revenue

Passenger traffic Evolution

In Q4 2025, African airlines continued to show resilient performance, with Available Seat Kilometers (ASKs) and Revenue Passenger Kilometers (RPKs) maintaining positive growth trends in 2025. The increase in both metrics are by 7.2% and 11.3%, respectively, compared to Q4 2024. Figure 3 below provides a detailed view of the Month-on-Month (MoM) and Year-on-Year (YoY) trends in ASK and RPK for African airlines from January 2024 to December 2025.

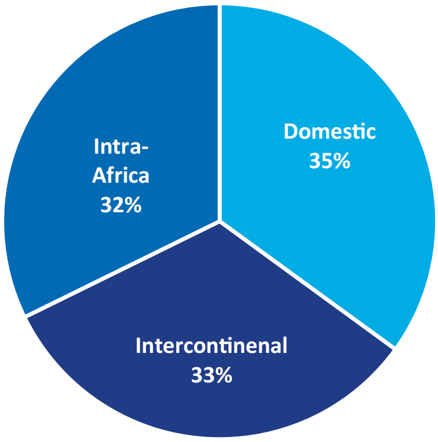
Figure 3: African airlines ASK and RPK growth



Passenger traffic distribution

In the third quarter of 2025, Domestic traffic accounted for 35%,of the total traffic, Intra-African flights accounted 32% of the traffic, while intercontinental flights represented 33%. This is illustrated in Figure 4 below;

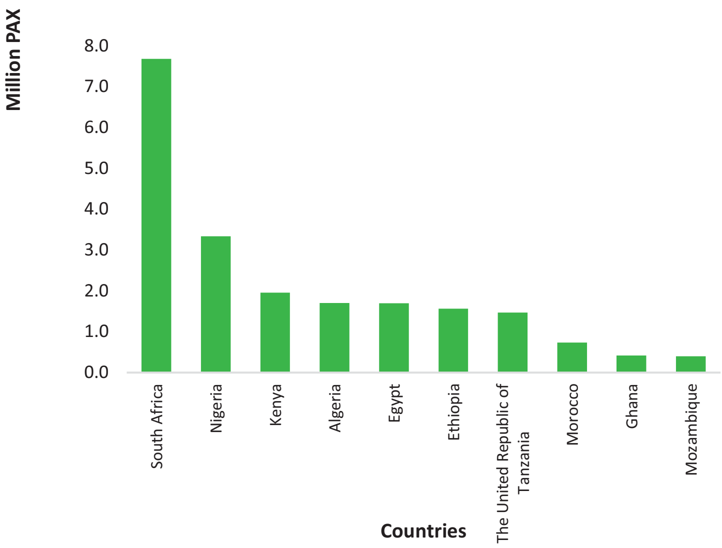
Figure 4: African Airlines passenger distribution Q3 - 2025



Source: OAG

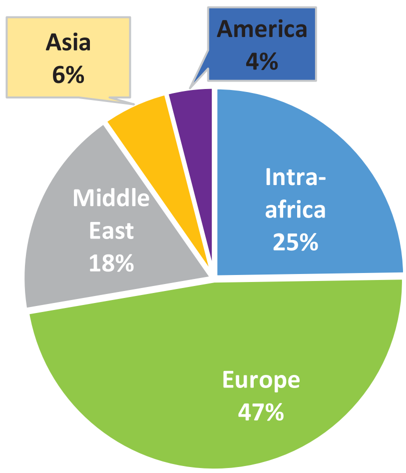
The Top Ten countries contributing to the 35% of domestic are as in Figure 5 below;

Figure 5: Top 10 Ranking by Country on Domestic Traffic Q4 - 2025



Source: AFRAA /OAG

Figure 6: African Airlines international passengers destinations Q4– 2025



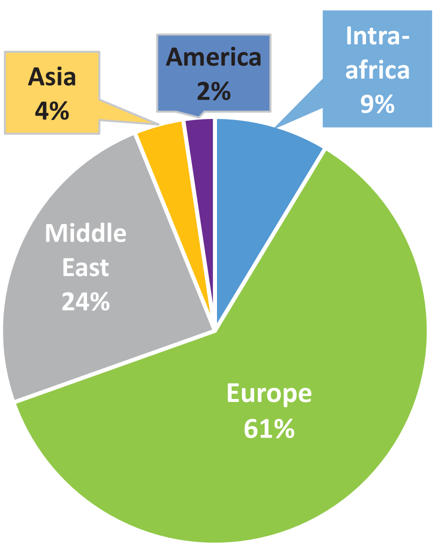
Source: OAG

In Q4 2025, international traffic is primarily driven by flights to Europe and intra-African routes each accounting for 47% and 25% respectively. Europe remains the top destination region for African airlines Egypt is the leading country of origin, while France is the primary destination. Traffic to the Middle East is also notable, comprising around 18%, while routes to Asia and the Americas each account 6% and 4% respectively.

Regional Insights

In the fourth quarter 2025, Northern Africa led the continent in passenger traffic, accounting for 42.1% of the total. Domestic traffic in this region was relatively low, representing only 12% of the total traffic. Intercontinental travel dominated, comprising 91% of the traffic, while intra-African travel made up just 9%. Egypt and Morocco are the top two primary source of traffic from Northern Africa to Europe, with France, Saudi Arabia, German, United Kingdom, Spain and Italy being the top destinations. The Middle East is the second most popular destination region, with Egypt as the leading contributor.

Figure 7: Traffic repartition - Northern Africa Q4 2025

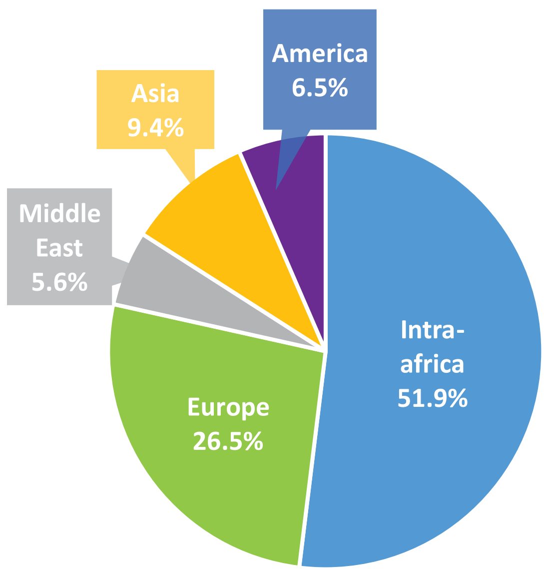


Source: OAG

In the fourth quarter of 2025, the Southern African region accounted for 19.6% of the continent's traffic. The domestic market was the largest contributor, making up 61% of the region's traffic. Intra-African travel was above international traffic, with a 51.9% share.

Regarding destinations outside Africa, Europe and Asia were the leading regions, with 26.5% and 9.4% of traffic respectively. The America and the Middle East accounted for 6.5% and 5.6% respectively during this period.

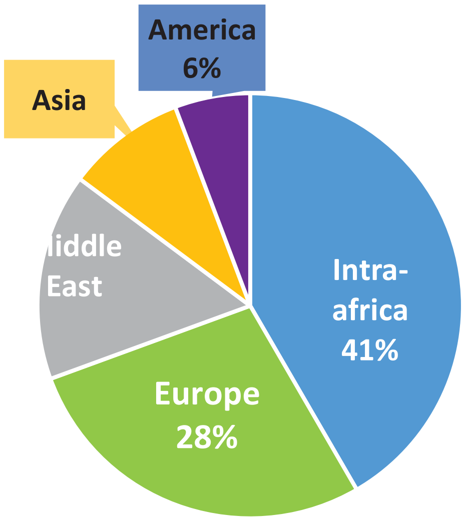
Figure 8: Traffic repartition - Southern Africa Q4 2025



Source: OAG

Eastern Africa represented 20.1% of the continental traffic during the fourth quarter of 2025. Domestic traffic constituted to 42% in the fourth quarter 2025. The Top destinations outside Africa are Europe and Middle East with 28% and 16%.

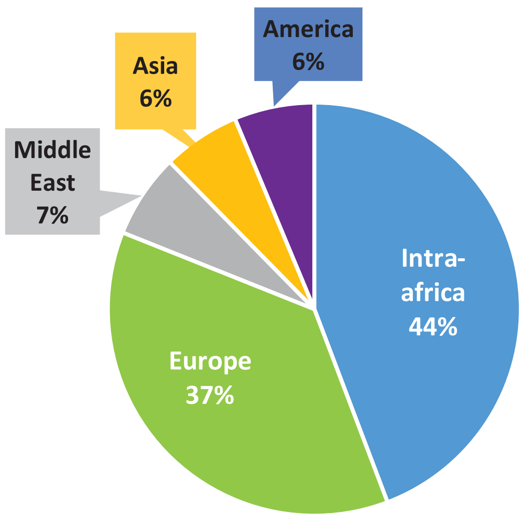
Figure 9: Traffic repartition - Eastern Africa Q4 2025



Source: OAG

Central and Western Africa regions together represented 18.2% of the African traffic during the fourth quarter 2025. The intra-African traffic accounted for 44% of the non-domestic.

Figure 10: Traffic repartition - Central and Western Africa Q4 2025



Source: OAG

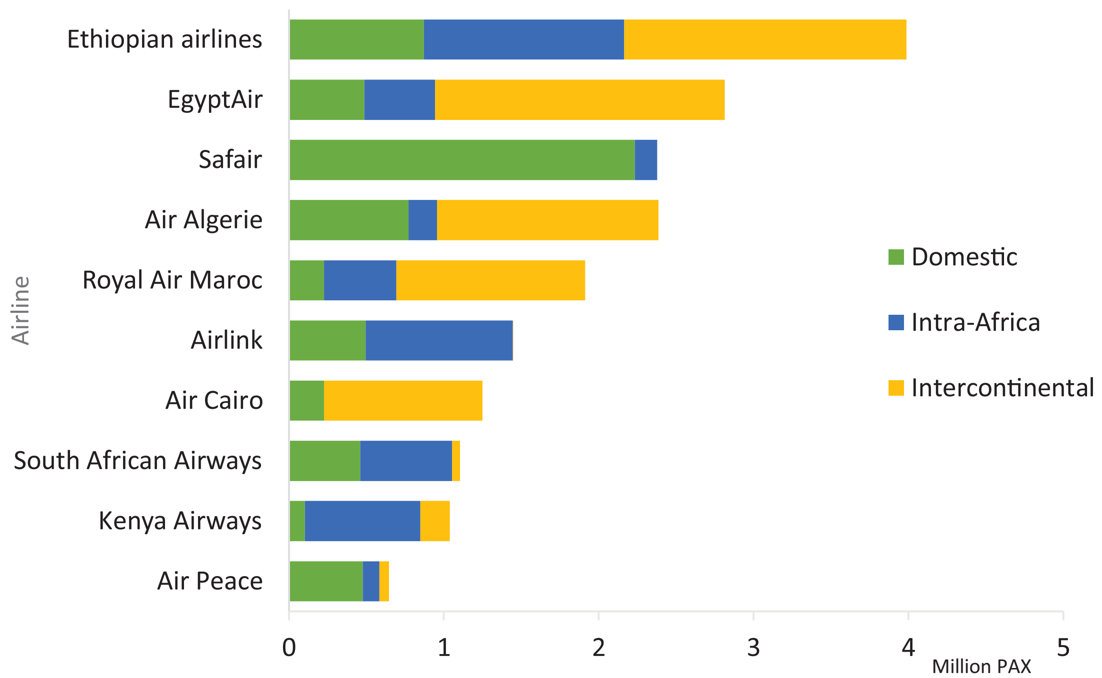
Outside the continent, Europe is the principal destination, representing 37%. The share of America and Middle East are 7%, and Asia is 6%.The domestic market accounted for 44% of the regional traffic.

African Airlines Ranking by Traffic (OAG estimations)

Figure 11 below presents a ranking of African airlines, with Ethiopian Airlines leading, followed closely by EgyptAir. Ethiopian Airlines dominance is attributed to its extensive network, reliable service, and strategic hub in Addis Ababa, which facilitates broad international connectivity. EgyptAir's strong perfomance underscores its historical significance and extensive operational reach across the continent and beyond. These rankings emphasize the growing importance of these airlines in enhancing regional connectivity and fostering economic development within Africa.

Figure 11: African Airlines ranking by traffic Q4 2025

(*) The data here are estimations and have not been confirmed by airlines

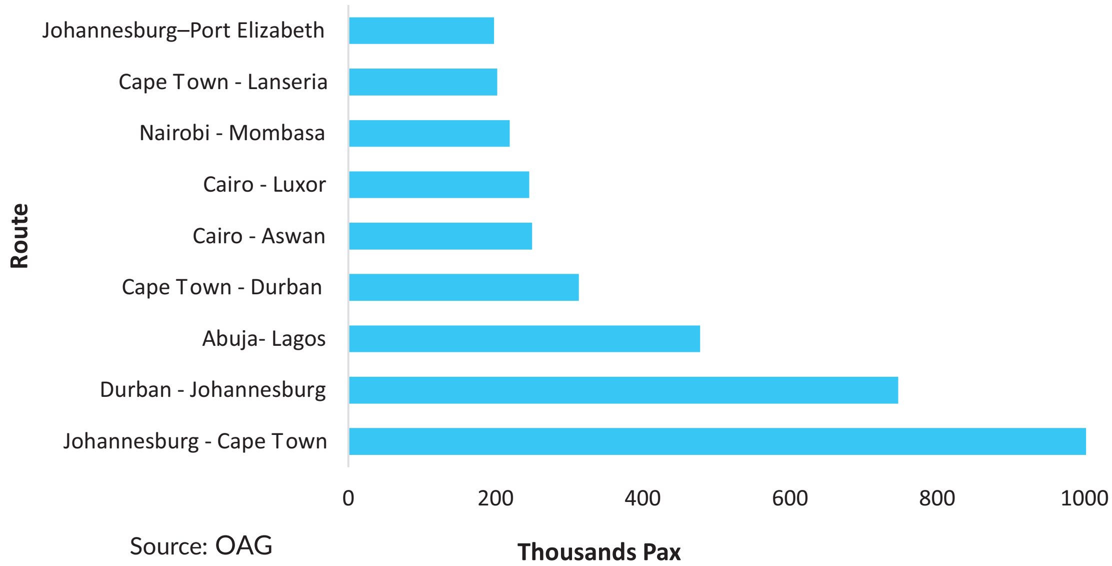


Source: OAG

Routes Ranking by Traffic (OAG estimations)

Top 10 domestic routes by passengers carried Q4 2025(OAG estimations)

Figure 12: Domestic routes ranking

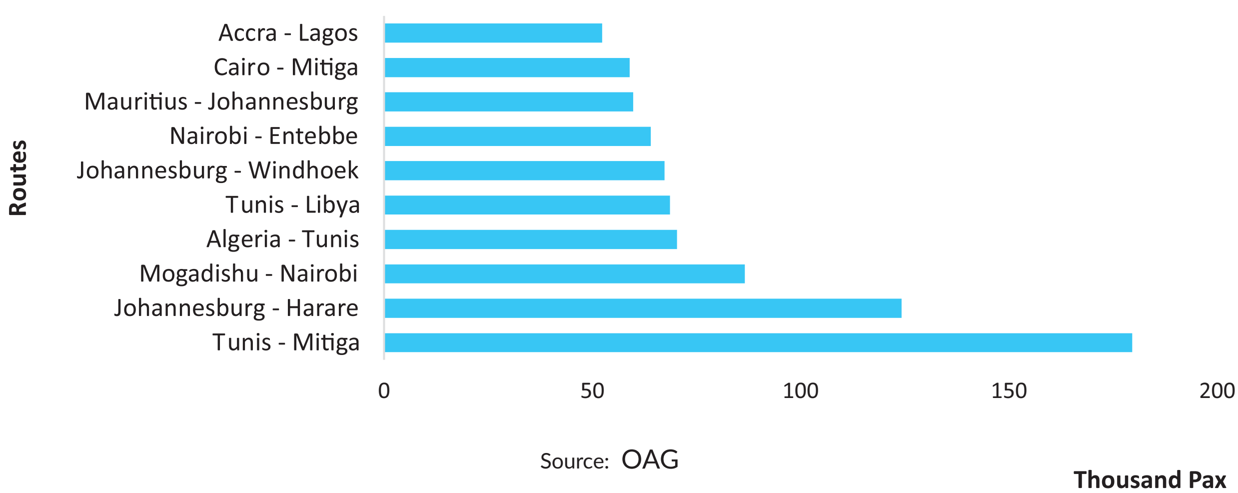


Source: OAG

Figure 12 above shows the top ten domestic routes in Africa. South Africa dominates the African market in domestic traffic, with 5 of its routes ranked among the top ten in the fourth quarter of 2025. This is followed by Egypt with 2 routes. Additionally Nigeria and Kenya each have a domestic route represented in the top ten busiest routes.

Top 10 Intra - African routes by passengers carried Q4 2025 (OAG estimations)

Figure 13: Intra-African routes ranking

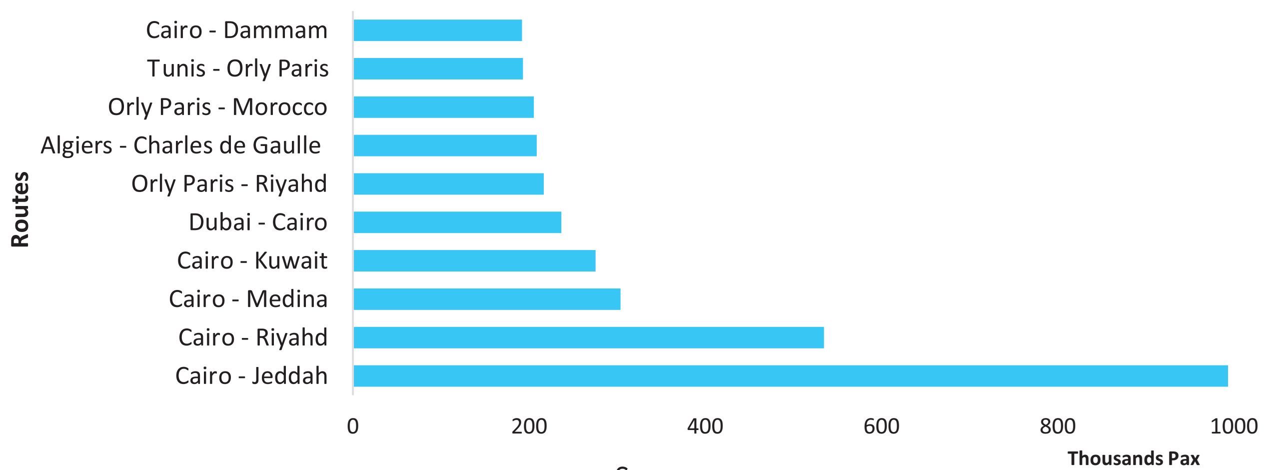


Source: OAG

Figure 13 above shows the top ten intra-African routes by passengers carried in the fourth quarter of 2025. The busiest intra-African routes are primarily within Northern, Southern and Eastern Africa. However, routes from Western Africa (Accra–Lagos) also ranked among the top ten in the fourth quarter 2025.

Top 10 Intercontinental routes by passengers carried Q4 2025 (OAG estimations).

Figure 14: Intercontinental routes ranking

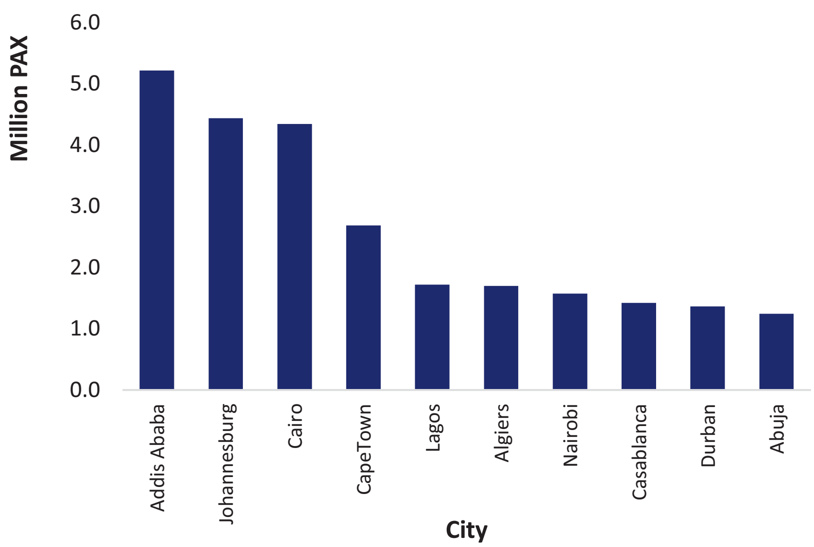


Source: OAG

Figure 14 show the intercontinental routes ranking and EgyptAir is the leading carrier on these routes, achieving the highest passenger volume during the fourth quarter 2025.

Airport Ranking by Passengers

Figure 15: African airports ranking by passengers Q4 2025 (OAG estimations)

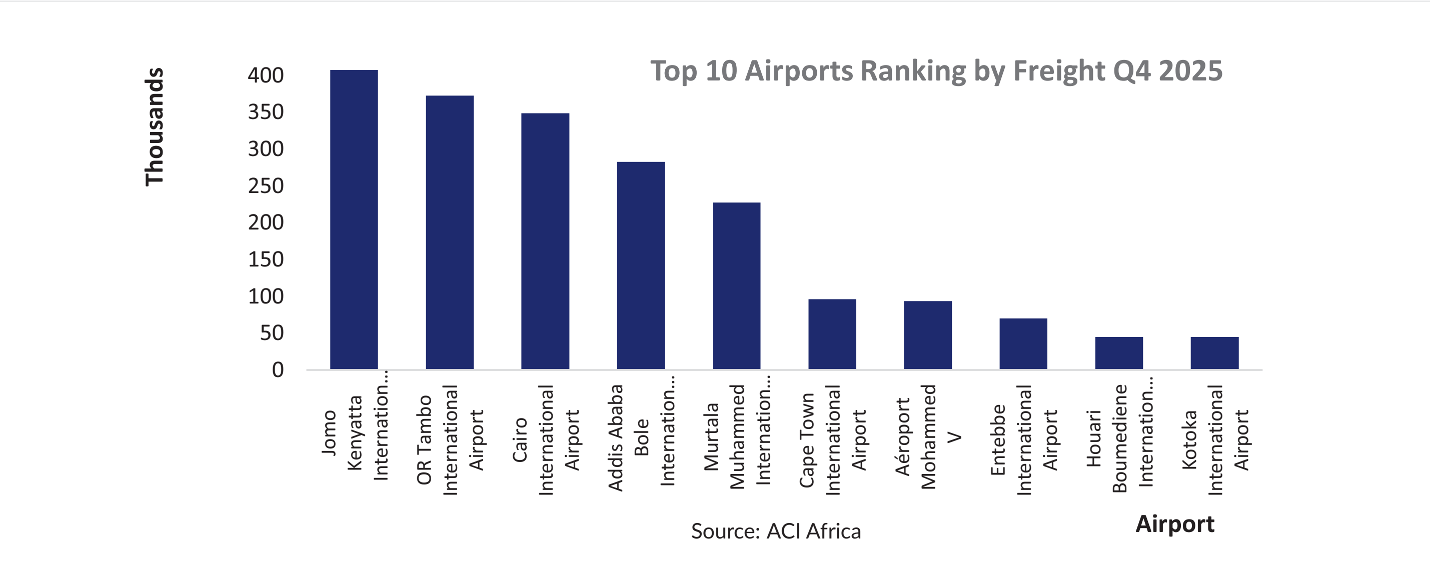


Source: OAG

Northern African airports featured prominently among the top 10 hubs in the fourth quarter 2025 with Addis Ababa, Johannesburg , Cairo and CapeTown ranking as the three leading airports.

Air Cargo Market Trends in Africa

Figure 16: Top 10 Airport Ranking by Freight Q4 2025 (ACI Africa estimations)



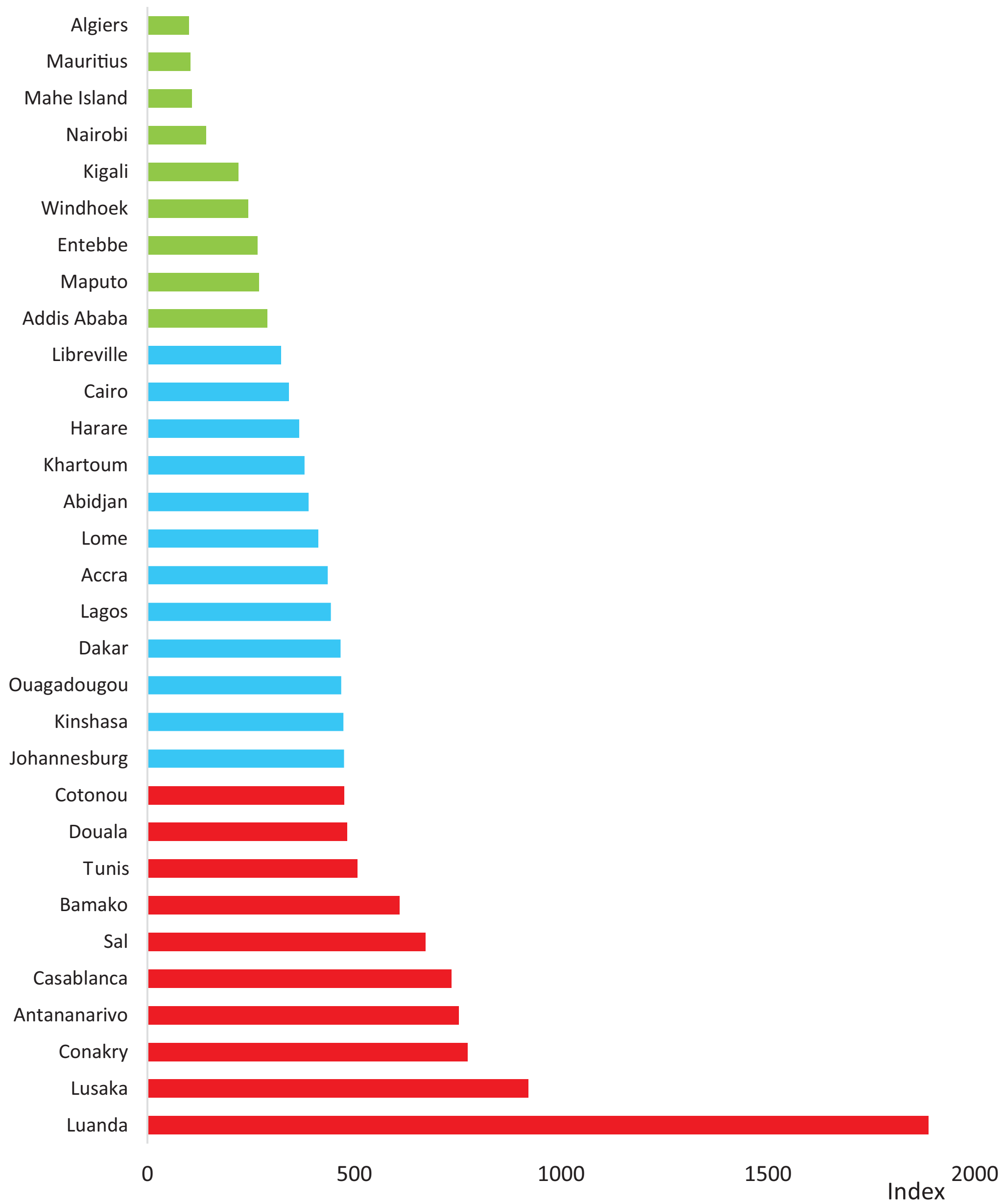
Airport charges

Methodology:

A comparative study based on a single aircraft type applies to all airports with more than 300 thousand passengers in Q4 2025. The aircraft type chosen is the B737, the most popular aircraft type in the region. Following the applied criteria:

Aircraft Type	B737
MTOW	70.08 Metric Ton
Flight Type	International
Origin & Destination Pax	100
Total Departing Pax	100
Parking Time	2 Hour
Boarding bridge time	1 Hour
Arrival Time	12:00
Cargo	0 Kilograms

Figure 17: African airports ranking by charge index Q4 2025



Source: IATA ACIC

Luanda has the highest charges among the selected airports, while Algiers has the lowest. Johannesburg, Addis Ababa and Cairo, Africa's busiest airports, have charges that fall below the average. This indicates that reducing airport charges could potentially boost traffic levels.

Intra-African Connectivity

Methodology:

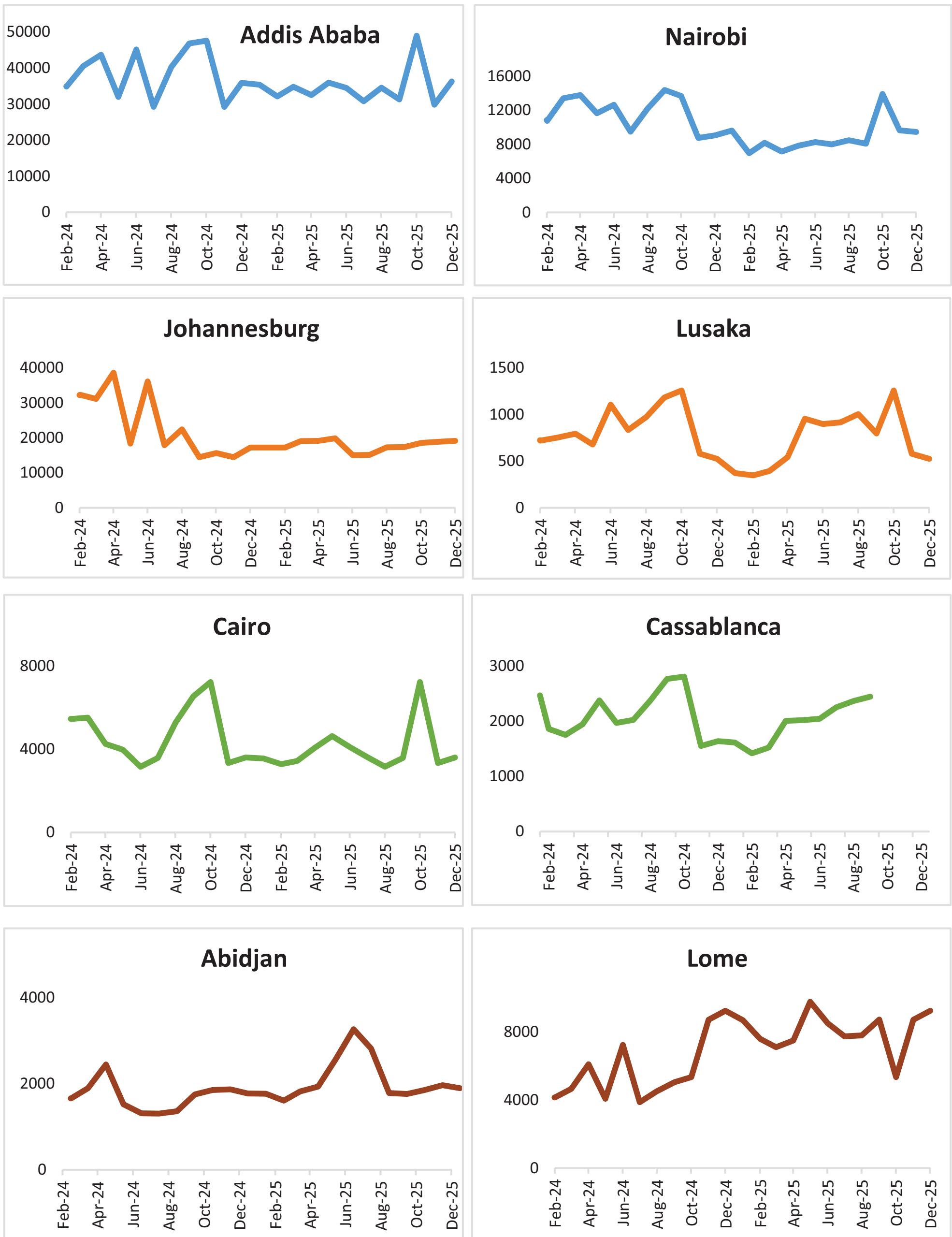
We calculate the total number of possible Intra-African connections between inbound and outbound flights on 20 important African hubs in Q4 2025.

The rules selected for the computation are as follows:

- Single connections only to/from the chosen airports,
- Minimum Connection Time from OAG table,
- Maximum Connection Window of 6 hours

The intra-African connectivity reached new heights in Q4 2025 showcasing a significant expansion in air travel links within the Africa continent.

Figure 18: Intra-African connectivity index per Regional hubs in Q4 2025

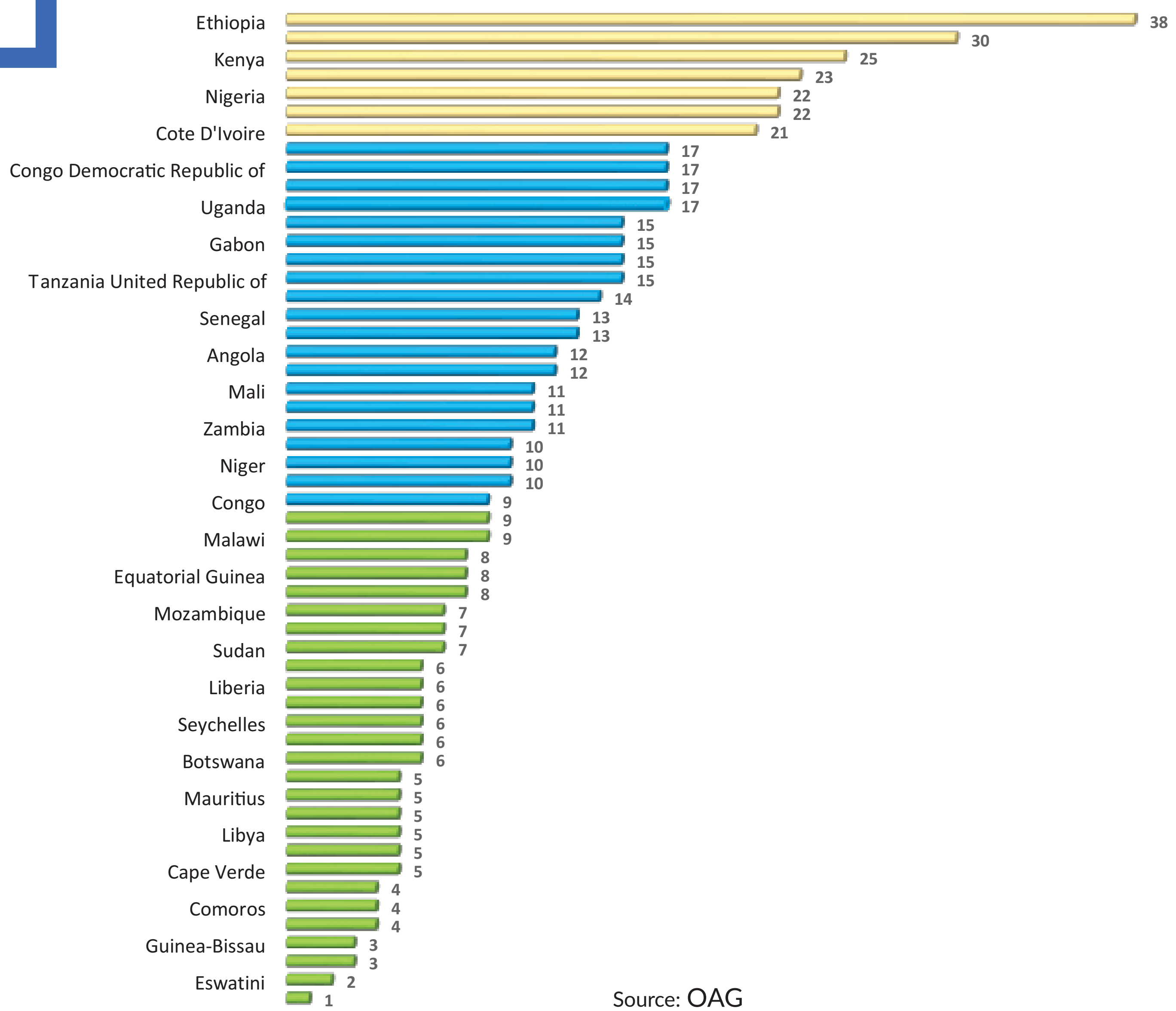


Source: OAG

Direct flights between African countries

During the fourth quarter of 2025, 7 out of the 54 countries in the African continent offered direct flights to more than 20 other African nations. Ethiopia leads with the most extensive network of direct flights within Africa.

Figure 19: Number of direct flights between African countries



Source: OAG

Table 1 below presents the proportion of direct connections within countries of the same region and between different African regions, expressed as a percentage of the total number of possible connections.

In Q4 2025, the overall connectivity index is relatively high, particularly in Northern Africa, which reported a connectivity rate of 75%. However, inter-regional connectivity remains constrained, with the highest connectivity rate observed between Northern and Western Africa, at only 33%.

The low levels of connectivity between subregions indicate significant opportunities for improvement. Enhancing these transport links could potentially improve economic integration and regional cooperation. Addressing these connectivity deficits may stimulate trade, tourism, and overall economic growth across the continent.

Table 1: Connectivity between African regions

Africa Regions	Central Africa	Eastern Africa	North Africa	Southern Africa	Western Africa
Central Africa	49%	12%	19%	9%	13%
Eastern Africa		52%	19%	24%	6%
North Africa			75%	5%	33%
Southern Africa				48%	2%
Western Africa					45%

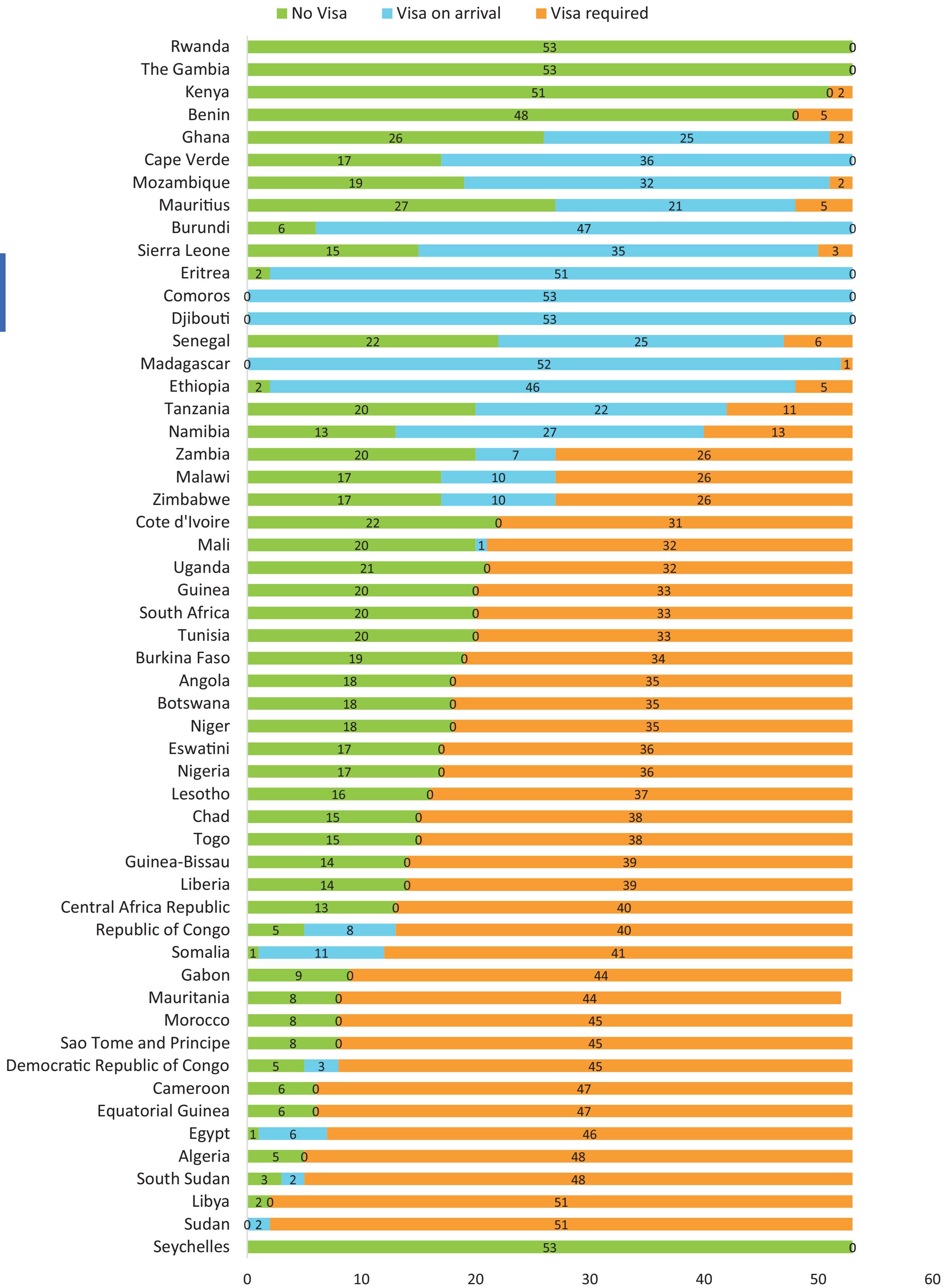
Source: OAG

Visa Openness within Africa

According to the Visa Openess Index, the Gambia and Rwanda offer visa-free access to all Africans.11 countries improved their score since last year: one is in the top 10, another is in the top 20.In 28% of country-to-country travel scenarios within Africa, African citizens do not need a visa to cross the border, a marked improvement over 20% in 2016.

In 2025, 31 African countries representing 57% of the continent offered an e-Visa for Africans, up from nine African countries representin 17% of the continent in 2016.39 countries have improved their score since 2016. Of the 10 that have most progressed, five are in West Africa, three are in East Africa, and two are in Southern Africa. Nine top-20 ranked performers are lower-income countries; four of them are landlocked. Another ten top-20 ranked performers are lower-middle-income countries. Lower-income countries continue to make progress.

Figure 20: Visa openness in African countries



Source: AfDB,AU,visaopenness.com **(2025)**

ANNEX: Reference

Q3 2025 Global Airline Industry Performance with OAG (Official Aviation Guide) as the primary source of data

International Air Transport Association (IATA) Aviation Industry Outlook 2025

FlightGlobal and CAPA Centre for Aviation Reports on Q3 2025 Global Aviation Performance

Airlines for America (A4A) and Eurocontrol for Regional Aviation Insights

ANNEX: Glossary

AFRAA: African Airlines Association

ACIC: Aviation Charges Intelligence Center

ASK: Availiable Seats Kilometres

FMTK: Freight and Mail Tons Kilometers

ICAO: International Civil Aviation Organization

IATA: International Air Transport Association

MoM: Month on month

RPK: Revenue Passenger Kilometers

WCAF: West and Central Africa

YoY: Year on Year

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